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ABSTRACT

This paper was prepared as an outgrowth of a Getty Center symposium sponsored by New Schools Better Neighborhoods (NSBN) and its partner organizations in May 1999. The subject of joint use, generically meaning the development of K-12 education facilities in combination with other facilities such as parks or libraries, was broached at the Getty Symposium as one of several means of accelerating and enhancing new school construction. Accordingly, a working group was formed under the guidance of NSBN with the charge to research, evaluate, and formulate recommendations regarding joint use. This is the first in a series of products prepared by the Joint Use Working Group. The paper is an overview of the subject and a point of departure for further study. It discusses the benefits of joint use, such as additional student housing, cost savings, and community enrichment programs and services, as well as its constraints, such as conflicting or non-aligned goals of the partners, operations and maintenance issues, and regulatory constraints. Also explored are themes of joint use, such as the school district as community developer, leveraging community goals, and adaptive re-use of existing structures. (EV)

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The Development of Educational Facilities Through Joint Use Mechanisms

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New Schools/Better Neighborhoods
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Table of Contents

I. Introduction
II. Description of The Joint Use Opportunity
III. Themes of Joint Use
IV. Findings and Next Steps
Project Assessment Summary

Joint Use Working Group

Alex Rose, Co-chair, Continental Development/Urban Land Institute

Steve Ross, Co-chair, Playa Vista/ Urban Land Institute

Paul Hernandez, Moderator, New Schools / Better Neighborhoods

Jeanette Justus, Jeanette C. Justus Associates

Susan B. Davis, Cox, Castle & Nicholson

Amy Arnold, City of Los Angeles

Anne Ferree, Gensler Architects

Kate Diamond, Siegel Diamond Architecture

Micheal B. Lehrer, AIA, Prop. BB Oversight Committee

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I. Introduction

This paper was prepared as an outgrowth of the Getty Center symposium sponsored by New Schools Better Neighborhoods (NSBN) and its partner organizations in May, 1999. The subject of joint use, generically meaning the development of K-12 education facilities in combination with other facilities such as parks or libraries, was broached at the Getty Symposium as one of several means of accelerating and enhancing new school construction. Accordingly, a working group was formed under the guidance of NSBN with the charge to research, evaluate and formulate recommendations regarding joint use. This is the first in a series of products prepared by the Joint Use Working Group.

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This paper is an overview of the subject and a point of departure for further study. Several case studies of functioning joint use projects in California have been researched by the members of the working group. Each project was evaluated through telephone interviews with project representatives, usually school district staff, and analysis of written agreements upon which the projects are based. The primary focus of the case study analysis was to learn from the experiences of those who have gone before, from their successes as well as from actions they would do differently if they had the chance to start again.

In addition to the case studies, the working group monitored the deliberations of the State Allocation Board in its evaluation of joint use. The SAB is presently considering joint use as one of a number of cost reduction strategies for new school development as required by SB 50. Education Code provisions relevant to the subject of joint use have also been evaluated.

Finally, the Joint Use Working Group has engaged in a number of brainstorming discussions as a means of framing up the issues and challenges of this important topic. The brainstorming sessions have informed the paper as a whole and were particularly relevant to the section on Themes of Joint Use.

II. Description of The Joint Use Opportunity

A. Benefits

In their struggle to provide cost effective and adequate student housing in a way that promotes quality of life in the community, school districts are exploring more joint use opportunities. The potential benefits are multiple and can be categorized as opportunities that provide:

Additional Student Housing

Cost Savings, either in capital facilities and/ or in ongoing operational cost

Community Enrichment Programs and Services

1. Additional Student Housing

A primary benefit to joint use agreements is to provide additional student housing. This is especially true in areas where existing schools are overcrowded and land to build new schools is scarce. School districts in urban areas have by necessity become creative in their search for places to build and expand school facilities. Joint use increases those opportunities. Through partnerships with the private sector and with other public agencies, schools have been built on park, museum, college, commercial and other school sites.

One example of a public-private partnership in a community that is almost entirely built-out is the Mendez Fundamental Intermediate School. Currently completing construction on a site that shares space with a renovated shopping center, this Santa Ana Unified school project provides school facilities constructed on top of a shopping center parking structure. Mendez has not proven to be an inexpensive school to build. However, it does not displace any housing, and this in and of itself is extremely important in the Santa Ana community. Besides some relief from overcrowded school housing, the community also benefits from the redevelopment of an underutilized

shopping center.

The Center for Advanced Research and Technology, jointly constructed and operated by two unified school districts provides another example of a creative way to provide additional student housing when limited space is available. The project serving the Clovis Unified and Fresno Unified school districts, will serve 1500 half-time high school students in a state-of-the-art technology learning center. These students will also be enrolled in comprehensive high schools where they will be able to participate in sports, theatre arts and all the activities provided by traditional high schools. The Center for the Advanced Research and Technology is being built on 9 acres, in an existing manufacturing building. The two districts have established a Joint Powers Authority (JPA) to operate and maintain the school. The JPA will contract with each district to provide services such as human resources, food services and fiscal services. Each district will be relieved of some high school over-crowding as 750 students from each district enroll in the specialized school.

2. Cost Savings

Traditionally, joint use has been seen as a mechanism to save capital and sometime operations costs to the taxpayer. In 1998, the California legislature signed into law SB 50, representing comprehensive school facility and finance reform. Within SB 50, the State Allocation Board is required to adopt guidelines to achieve costs reductions in school construction. Joint use recommendations are mandated to be included in the cost reduction guidelines. Cost saving benefits frequently come from the shared use of land, such as the combination of schools and parks or of two schools sharing field space. Districts also build combination school/city library facilities and theaters on school campuses. This saves the community from the construction of two separate facilities.

Measuring the amount of cost savings is complicated, since joint use projects often are funded by a combination of various funding mechanisms and sources and are regulated by various entities. The ultimate facility may not result in school district savings, especially since districts must follow higher construction safety standards that are carried over to community facilities. This puts the school district in the position of often funding the projects themselves to ensure these standards are met. The savings is realized in the overall costs, which would be considerably higher if the same facilities and services were provided to the community without joint use agreements.

3. Community Enrichment Programs and Services

The provision of more and better services to the community is often the greatest benefit of joint use. The services may be providing after school use of school playgrounds, theaters and libraries. Schools get the use of fields and other athletic facilities, theaters and libraries during school hours.

The joint use library on a school campus is an excellent example of the enrichment of the school children and the community. A city/ county library can offer student access to the county-wide system on campus and much greater resources than secondary schools can offer. The hours can be extended for easy access for students after school.

4. Other
Sometimes, joint use provides other benefits. One community in northern California incorporated a joint use project advocated by the community into their general obligation bond strategy. When the community voted general obligation bonds to build school facilities, they also got tournament level athletic fields. The district was able to leverage the general obligation bonds to get state funding to construct new facilities and modernize existing schools. The new fields are maintained with user fees. A local community athletic association runs the concession. The secondary school students also use the fields during school hours and the community benefits after school and on weekends. National tournaments are attracted to community.

B. Constraints
Along with the benefits of joint use, come a complicated assortment of obstacles and challenges that must be overcome to realize a successful project. These constraints can be categorized as follows:

Conflicting or non-aligned goals of the partners

Operations and maintenance issues

Regulatory constraints

1. Conflicting or Non-aligned Goals of the Partners
School districts, cities, counties, community colleges, and private sector partners attempting joint use partnerships are often confronted with turf issues, difficulties in implementing joint use agreements and assorted battles along the way. A recent workshop among school community representatives addressing joint use outlined a number of ways to avoid these issues, including:

Obtain support of the joint use project by the policy makers

Identify specific benefits and relative value of the project to each party

Document benefits in a formal agreement

Determine governance of joint use facility up front and document in the agreement

Outline a process to resolve inter-jurisdictional conflicts in the formal agreement. These conflicts can be expected.

Obtain approval of the formal agreement by the policy makers

2. Operations and Maintenance Issues
Typically, operations and maintenance issues revolve around hours of use, responsibility for maintenance, security and cost of maintenance, especially when facilities are heavily used by the district and the community. Successful joint use projects seem to result through well developed agreements that are clearly understood by both parties and from on-going communication between the partnering entities. Monthly and sometimes weekly coordinating meetings have been helpful in many of the projects documented in the case studies.

In one of the case studies, the Sweetwater Union High School and the City of Chula Vista collaborated on the joint use of a library and high school . Here, the library was built and maintained on the high school campus by the District. However, the City operates the library from 3 until 10 PM weekdays and on weekends and summers. Each weekday there is a school-city library staff turnover at 3 PM. Security is one area that has not been worked out to the satisfaction of the community. Because of security reasons, the general public is not allowed in the library when high school is in session.

3. Regulatory Constraints
All construction projects in today's world are regulated by a multitude of laws to protect the safety of the community and the environments. The regulations governing the construction of schools, other public buildings and private buildings each have different policy goals and legislative histories. Joint use projects often involve regulatory compliance beyond the familiar world of the entity with whom the school district is partnering. An example is the Field Act that establishes a higher construction standard to address earthquake safety in all school facilities. A theater, auditorium, multipurpose center built by a city, but to be used by the district for classes or school activities must be built to Field Act standards. On the other hand, local ordinances, often not required by school districts, become relevant as joint use projects are implemented. As a case in point, Elk Grove Unified is currently planning a joint use library with the Sacramento Public Library Authority. This project comes under the county art-in-public-places ordinance. The JPA formed to build and operate the library, however, does not have funding to provide the art required.

Regulatory constraints not only complicate construction projects, they can also effect the operations of joint use facilities. For example, school districts have run into conflict with libraries as they address school library policy and the Library Freedom Act. Districts are typically more restrictive of access to library reading materials and the internet than are libraries.

III. Themes of Joint Use
Building schools in conjunction with other compatible, synergistic facilities represents an opportunity for school districts to leverage their limited resources in meeting their new facilities goals. The opportunity is of even greater importance in urban districts where available land is scarce.

We believe that those charged with building new schools will benefit from considering joint use in the context of the following themes or paradigms:

A. School District as Community Developer

New Schools Better Neighborhoods, as the name says, is predicated on the idea that schools and neighborhoods can and should have a positive influence each other. While it may not be self evident, school districts are in the community development business when it comes to building new facilities. As such, it may be useful to think like a company that is in the business of building new communities. Successful community building is driven by many factors. A few precepts that may be relevant:

1. Land is a limited resource. It must be handled with respect and a strong sense of economy. Look for ways for the project site to serve multiple functions.

2. Consider the community. No project happens in a vacuum. The neighbors of a project site are your constituency. Explore how your goals may overlap with those of your neighbors and pursue alliances.

3. Create value. Schools that enhance their neighborhoods create value in terms of improved quality of life and property values. The ability of a new school to create value may be a function of the other facilities that come with it, such as a library or park.

4. Create projects you'll be proud to show your grandchildren. School districts are in the "placemaking" business when it comes to creating new facilities. Building schools in conjunction with parks, libraries, museums, hospitals, fire stations, or performing arts centers is an enormous opportunity to create places that enhance neighborhoods and the larger community.

B. Leveraging Community Goals

1. Look for common ground.

Look for common ground with your community. School facilities that address a community goal as well as a new school facilities goal are prime opportunities for joint use. The case studies include examples school districts collaborating with public and private entities to achieve their respective goals. Whether the shared use is a softball complex or a performing arts center, the result is a new school facility with lower initial cost, lower operating cost or both.

2. Community Initiated.

Sometimes, the idea of joint use can be initiated by the community itself. Consider the Clovis Unified School District case study involving a shared education center and softball complex initiated by community sports field advocates.

C. Adaptive Re-use of Existing Structures

1. Building Recycling.

Consider adapting existing, available buildings for single or joint use projects. Under utilized or vacant office or industrial buildings may offer opportunities to produce new classroom capacity faster, cheaper or both. Consider, for example, the Otis Parsons School of Design occupying the former IBM building near LAX or

Loyola Marymount University acquiring the former Hughes Aircraft headquarters building in Westchester. While these facilities were not public schools subject to Field Act requirements, they are instructive of a potential source of new school capacity.

2. Revenue Potential.
The re-use of existing facilities as a joint use may create the opportunity to offset costs through the generation of revenues to the district. Consider the office building examples where a portion of the building is used by the district for classroom space and a portion is leased to users such as childcare or health club operations.

IV. Findings and Next Steps
The environment is excellent for exploring and developing joint use opportunities. Through SB 50 and the flexibility of this legislation, joint use is made easier. The State Allocation Board and Office of Public School Construction are openly encouraging districts to work with other entities. Local government and the private sector are aware of school construction funding and recognize the opportunity to get facilities built that would serve a broader community as well as the district. Still there are a number of challenges that must be addressed and resolved. The New Schools Better Neighborhoods Joint Use Working Group will next turn its attention to strategies and actions necessary to deal with the issues raised in this paper, including:

1. Joint use facilities, while providing an overall cost savings to the taxpayer, may cost school districts more than a facility built solely for school use;

2. Negotiating joint use agreements followed by ongoing communication between partnering entities are staff time intensive;

3. It is easier for districts to stay in the comfort zone of building schools within its world of regulatory constraints;

4. It is easier for other entities to stay in the comfort zone of constructing buildings without the additional regulatory constraints that accompanying school construction;

5. While SB 50 encourages joint use, it also establishes the new requirement that school buildings using state construction funding can only be built on sites that are owned by school districts;

6. Clean-up legislation to address funding for "district-owned sites only" may provide that only publicly owned sites can be used for state funded school construction. This would eliminate many public-private opportunities for joint use;

7. School districts are becoming increasingly concerned not only about the cost effectiveness of building joint use, but of the long term cost and commitment districts must make to operate and maintain community facilities.

David Abel, Managing Director david@nsbn.org www.nsbn.org
811 West Seventh Street, Suite 900 Los Angeles, CA 90017
Telephone: (213) 629-9019 Facsimile: (213) 623-9207

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